National Aeronautics and Space Administration

SATERN

SATERN

System for Administration, Training, and Educational Resources for NASA

Training Guide for Supervisors

Contents

Letter from the Program Manager

May 2006

Dear NASA Supervisors,

NASA's most critical asset in accomplishing its mission is a high-performing workforce. The role of the Supervisor is vital to successfully transforming NASA's workforce to fully meet the challenges ahead.

As NASA's new Learning Management System (LMS), SATERN provides automated functionality for the Supervisor, such as:

- Electronic training approval process
- Access to online employee Learning Plans
- Real time status of employee progress and training history by individual or group.

In the near future, SATERN will significantly enhance functionality and become a tool Supervisors use for:

- Career Planning
- Individual Development Plans
- Competency Management.

These improvements will increase workforce flexibility and reduce the risk of developing gaps or surpluses in needed competencies.

The launch of SATERN is a significant transformation effort for NASA. It offers our employees one-stop access to their learning plan and other training resources. Helping employees adapt to SATERN and its functionality will improve the ability of Supervisors to contribute to the development of direct reports, as well as ease their transition to SATERN.

Your role as Supervisor is an important role in SATERN and within NASA. I thank you for your continued commitment to NASA's mission and leading our workforce.

Sincerely,

Bill Brewster
Office of Human Capital Management
Agency Program Manager, Director of Business Management Office

Introduction

SATERN—the System for Administration Training and Educational Resources for NASA—is NASA's new Learning Management System (LMS) that offers web-based access to training information.

SATERN is an approved e-Government initiative supporting the President's Management Agenda. It is expected to improve Agency services and reduce costs through the effective management of training activities and the consolidation of three learning management systems (SOLAR, AdminSTAR and NORS) into a single, integrated system.

SATERN will improve consistency and efficiency in training operations through the implementation of standard training processes and on-line access to consolidated training data.

SATERN provides employees a "one-stop" approach to managing NASA training activities. Through SATERN employees will be able to:

- Easily identify required training
- Launch available online courses
- Search course catalogs for training opportunities
- Submit training registration requests
- Review your training history
- Generate personalized training reports

As a supervisor, you can use SATERN to approve training requests, assign training, run reports on your direct reports, and track progress against development goals (in the near future).

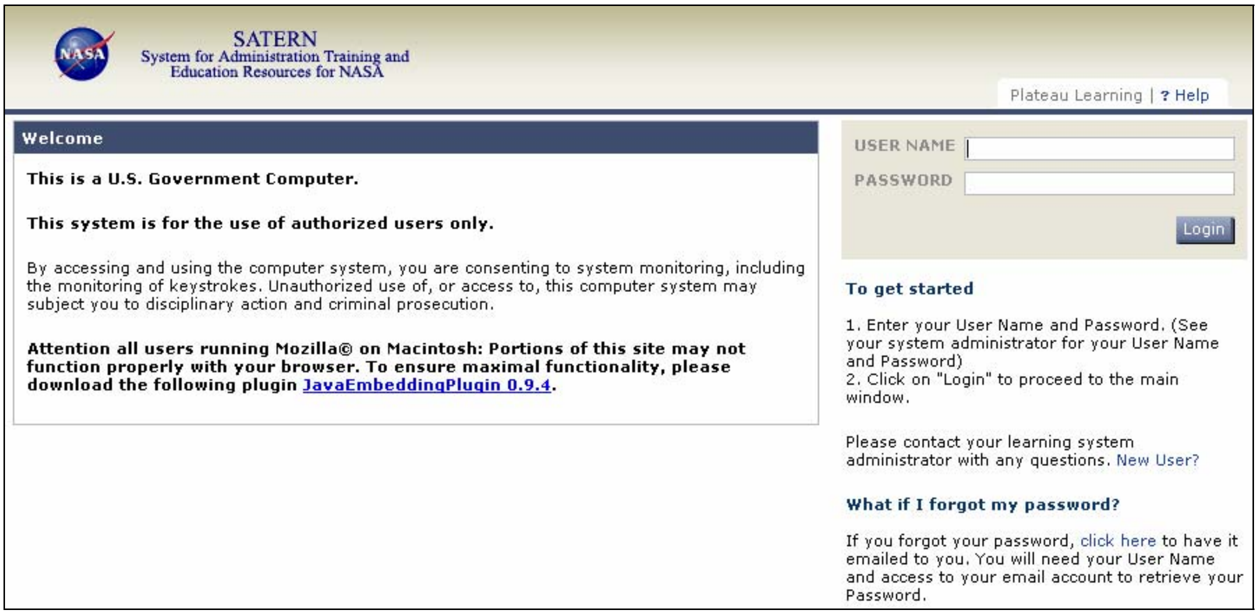
This document is a step-by-step guide to help Managers/Supervisors understand their unique capabilities in SATERN and efficiently manage their employee's training and development.

http://satern.nasa.gov

Logging Into SATERN

1. Open your Internet Browser and go to this URL: https://satern.nasa.gov.

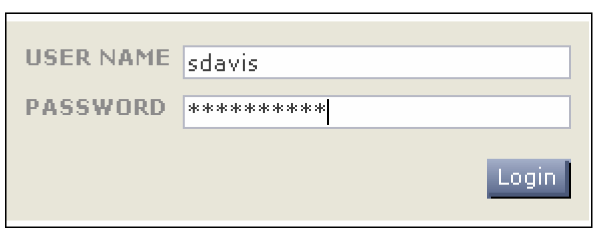
A welcome screen appears, as shown below.



2. In the **User Name** text box, enter your User Name.

The User Name is case-sensitive. Be careful not to include any spaces before or after your User Name because spaces are counted as characters.

3. In the **Password** text box, enter the password provided to you. As you type it, asterisks appear (instead of the characters you're typing).



The password is also case-sensitive.

NOTE: Your User Name and initial Password will be sent to you via email according to NASA IT Security standards.

4. Click the **Login** button. The home page will appear, as shown below.

If Your Account Is Locked

If you receive a message that your account has been locked, it means that you have exceeded the maximum number of login attempts (currently set to 3 attempts). In other words, you entered the wrong information 3 times.

If this happens, contact the SATERN Help Desk at 1-866-419-6297 to have your account unlocked, or wait for one hour and try again.

Managing Subordinates as a Supervisor

Some Learners are supervisors of others. As a supervisor, you have the ability to perform managerial duties in SATERN. These duties are:

- Assigning Items to Subordinates
- Enrolling Subordinates in a Scheduled Offering
- Viewing the records of Subordinates
- Approving Enrollments

Am I a Supervisor?

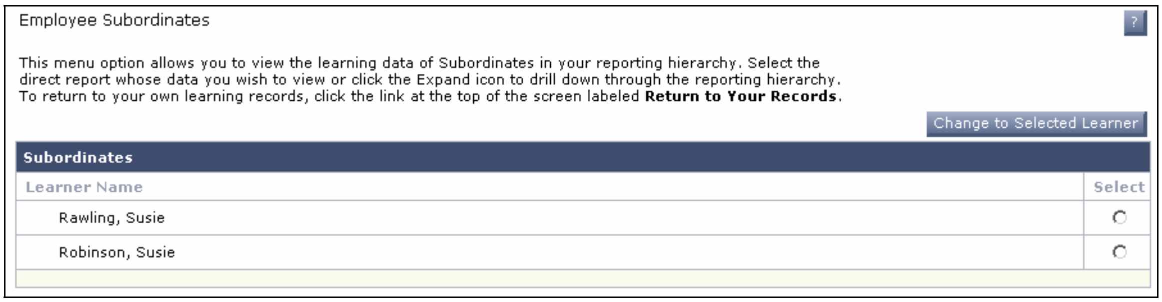
If you see the **My Employees** menu option in the top menu bar, then you are a Supervisor and have at least one subordinate.

Opening a Subordinate's Record

As a supervisor you can open and view the records of your subordinates. This includes their Learning Plans, Curriculum Statuses, Registrations, and Learning Histories.

To open a subordinate's record, follow these steps.

1. Select **My Employees** from the top menu and the screen below displays.



2. Select a Learner, and then click the Change to Selected Learner button.

The selected Learner's record opens. Observe the **Currently Viewing** message on the top menu bar, which indicates whose record you are viewing. In the example shown below, Sandy Davis is logged in, as indicated by the **Welcome** message, but she is viewing the records for Susie Robinson, her subordinate.

Once you've opened a Learner's record all menu items pertain to that Learner. For example, if you click **Learning** and then click **Current Registrations**, as shown below, you'll see the registrations for the Learner you're currently viewing.

Return to Your Own Record

After you've finished working with the records of your subordinates, click the **Return to your records** link, as shown below.

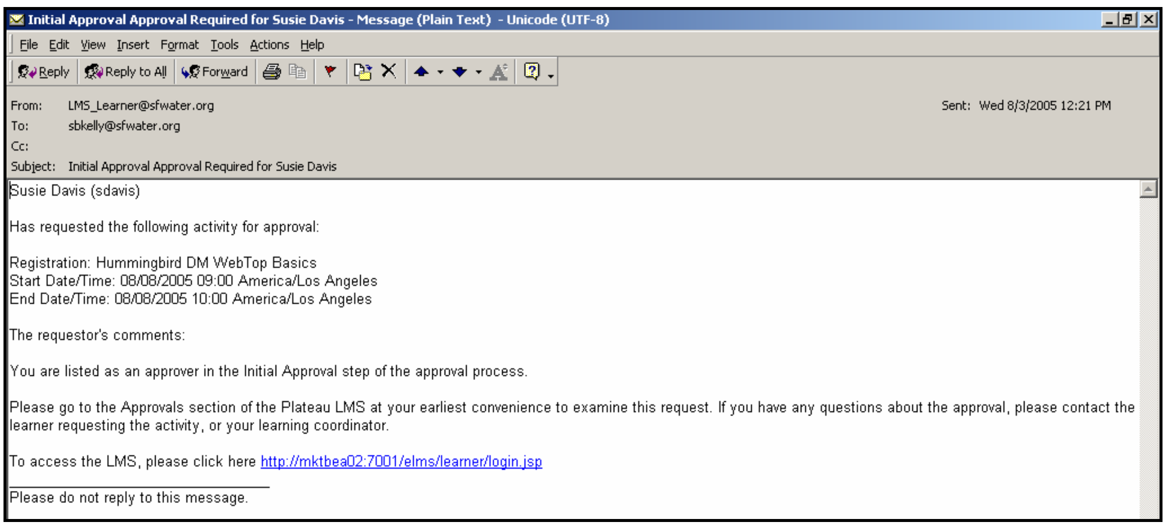
Approving Enrollments

As a supervisor, you will be approving enrollments for Learners who have been designated as your subordinates.

Most Scheduled Offerings require supervisor approval after a Learner has registered him/herself. Some require multiple approvals. For example, a particular training request might require approval from a supervisor and a designated approver in the Training Office.

Follow these steps to approve or disapprove training requests.

1. When one of your subordinates registers for a class, you'll receive an email in Outlook similar to the one shown below. Click the blue URL link to open SATERN in Internet Explorer.


Initial Approval Approval Required for Susie Davis - Message (Plain Text) - Unicode (UTF-8)

File Edit View Insert Format Tools Actions Help

Reply | Reply to All | Forward

From: LMS_Learner@sfwater.org
Sent: Wed 8/3/2005 12:21 PM
To: sbkelly@sfwater.org
Cc:
Subject: Initial Approval Approval Required for Susie Davis

Susie Davis (sdavis)

Has requested the following activity for approval:

Registration: Hummingbird DM WebTop Basics
Start Date/Time: 08/08/2005 09:00 America/Los Angeles
End Date/Time: 08/08/2005 10:00 America/Los Angeles

The requestor's comments:

You are listed as an approver in the Initial Approval step of the approval process.

Please go to the Approvals section of the Plateau LMS at your earliest convenience to examine this request. If you have any questions about the approval, please contact the learner requesting the activity, or your learning coordinator.

To access the LMS, please click here http://mktbea02:7001/elms/learner/login.jsp

Please do not reply to this message.

2. Enter your user name and password. Your home page appears.

3. Your home page displays a red alert notifying you that you have pending approvals, as shown below. Click it to open the approval tool.

*Note: An alternative method is to select **Personal** from the top menu, then **Approvals.***

4. Remove the checkmark from the **Enter Reasons for Approvals or Denials** checkbox (unless you want to enter a reason and have it emailed to the Learner).

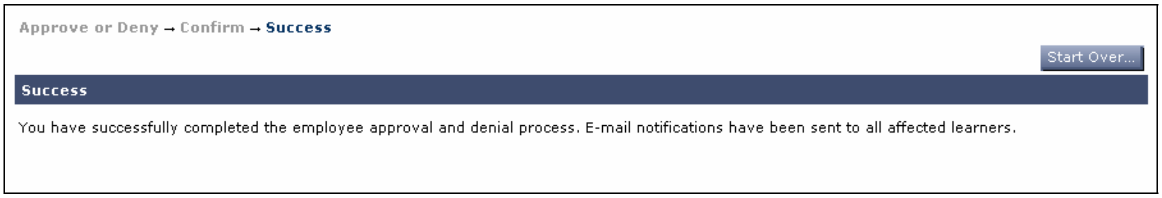
5. Select **Approve**, **Deny**, or **Skip** for each submitted enrollment request.

   Note: You can click the next to the Learner's name to view the details about a request, including any comments the Learner may have entered when requesting the class.

6. Click the Next button. The screen below appears, and you can use it to review your selections.

7. Click the Confirm button.

   You should see the message below, indicating the procedure was successful.



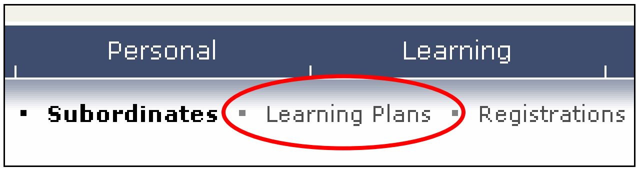
Assigning or Removing Items for Your Subordinates

As a Supervisor you have the ability to add or remove Item(s) to the Learning Plans of your subordinates.

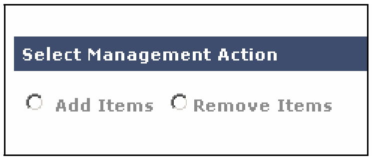
Follow these steps to assign Items.

1. Select **My Employees** from the top menu bar. A list of your subordinates will appear.

2. Select **Learning Plans.**

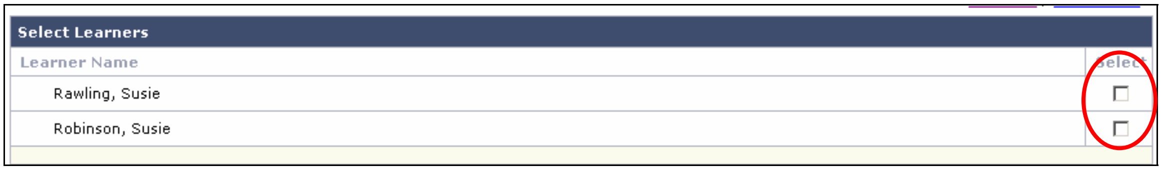


3. Select **Add Items** to add Items, or **Remove Items** to remove Items by clicking the corresponding circle from the section shown below.



4. Click the  button. A list of your subordinates appears again.

5. Click the **Select** checkbox next to each subordinate to whom you want to assign an Item.



6. Click the  button. This displays the Learners you've selected and lets you return to the previous screen if necessary.

7. Click the  button. The next screen is used to select Items to add to the Learning Plans.

8. To search for the Item(s) you want to add, enter a keyword(s) in the **Keywords** text field, and then click the Search button.

   Note: You may want to clear the Exact Phase box (if there's a checkmark in it) so the search doesn't have to be precise.

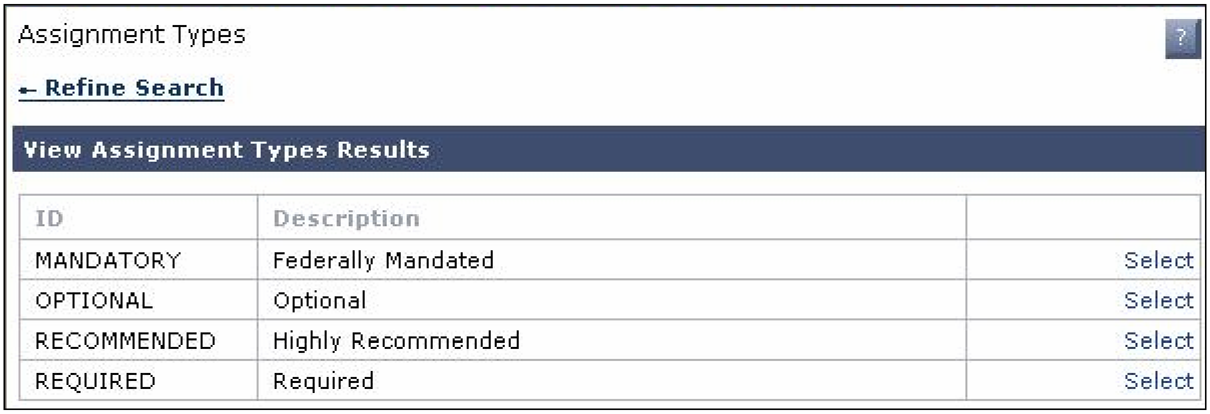
SATERN will search the title and description of the Items and display matches. In the example below, "Aerial" was entered and one offering was found.

9. Check the **Add** checkbox for each Item you want to add.

10. Click the Add Checked button.

11. If you are satisfied with your selections click the Next button.

12. If necessary, edit the **Assignment Type** by clicking on the **Select** link, then the Search button, and then selecting MANDATORY, OPTIONAL, RECOMMENDED, or REQUIRED, as shown below.

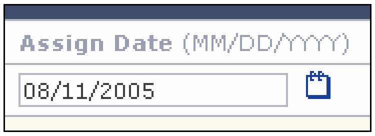

Assignment Types

← Refine Search

View Assignment Types Results

ID	Description	
MANDATORY	Federally Mandated	Select
OPTIONAL	Optional	Select
RECOMMENDED	Highly Recommended	Select
REQUIRED	Required	Select

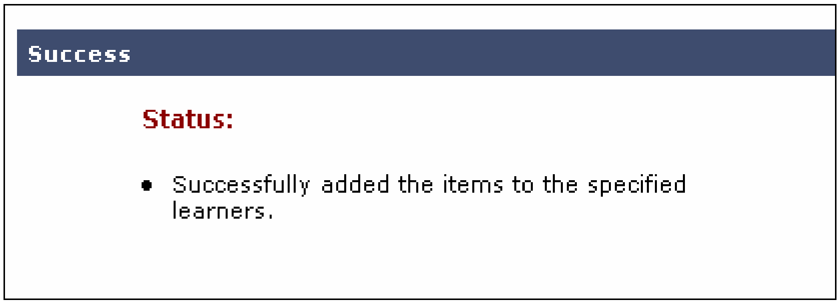
13. If necessary, edit the **Assign Date** (on the same screen). This date cannot be in the future, and will default to the current date. You can click the calendar icon to select a date, or just type it in the box.



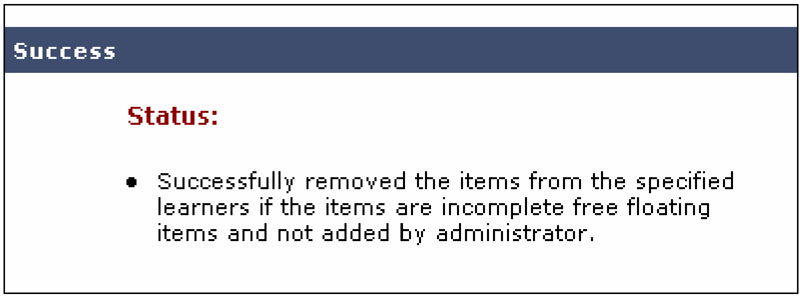
14. Click the Next button.

15. If necessary, edit the **Required Date** (due date) for each Item.

16. Click the Finish button. If you added Item(s), the message shown below should appear, indicating you've successfully added the item(s).



If you removed Item(s), the message shown below should appear, indicating you've successfully removed the item(s).



Reports

SATERN allows you to generate ten different reports. All reports have the same options to describe how you want to run the report. They differ in some of the content related fields. As a result, each report page is divided into two sections. The top section contains common report fields, and the bottoms section contains report-specific fields.

SATERN's Built-In Reports

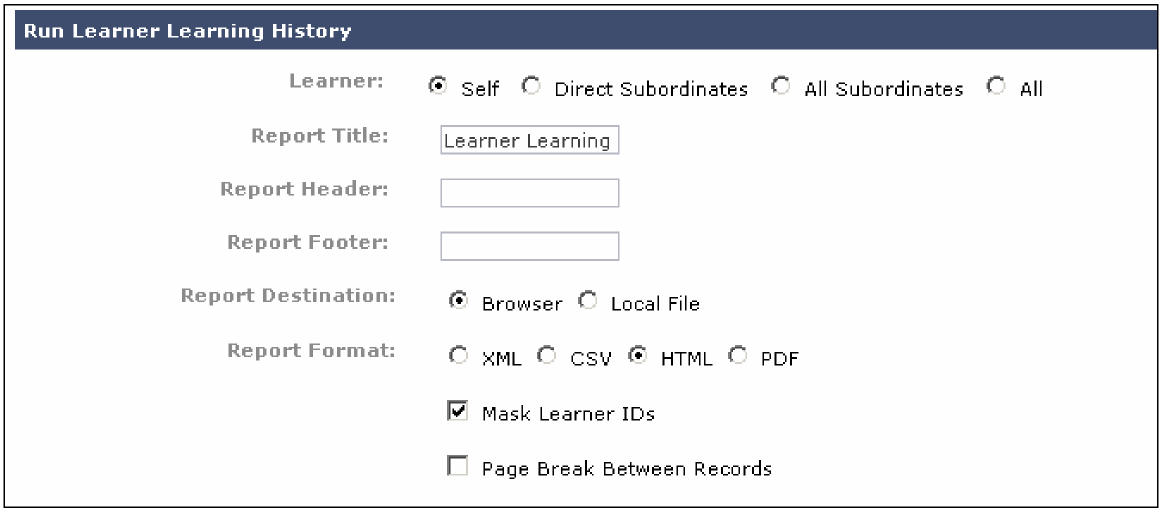
The following reports are available for Learners:

- **Curriculum Status**: The curriculum status report returns curriculum status by learner.
- **Item Requests**: The item requests report provides a list of the items that have been requested, the learner making the request, and the hours that were requested.
- **Item Status**: The item status report generates a list of the learners and the item status.
- **Learning Plan**: The learning plan report returns learning plans and the items that are a part of the learning plan.
- **Learning History**: The learning history report returns a history of learning activities.
- **Learning Hours**: The learning hours report returns learning hours by learner.
- **Learning Needs**: The learning needs report returns items in learning needs by learner.
- **Learner Information**: The learner information report returns profile data by learner.

Note: Many other reports are available if you are logged into SATERN as an administrator. Contract your Training Office for more information.

Running Reports for Subordinates

If you are a supervisor, you have the option of running reports that include data about your subordinates. Once you select a report from the Reports menu, the screen below appears. Notice it lets you run the report for yourself only, your direct subordinates, all subordinates, or all.



Self: Report returns your own data.

Direct Subordinates: If you are a supervisor, the people who report directly to you.

All Subordinates: If you are a supervisor, all people who report to you, either directly or through another subordinate.

All: Returns data on you and all subordinates.

Running a Report for One Subordinate

If you just want to run a report for one subordinate, use the **My Employees** menu to switch to the subordinate, then go to the Reports menu and select the report you want to run for the individual.

Terminology

Item: Referred to as Learning Item, this is an assignable unit for which completion can be tracked and recorded. Items are usually learning-related such as a required course or training activity. Items can be web-based, instructor-led, identified as required reading materials or videos.

Learner: Any person for whom a record has been created in the Learners section of the Learner Management area, including employees, contractors, and others for whom you wish to keep learning records and to register for courses.

Learning Event: A learner's completion or attempted completion of a Learning Item. For example, when learners' attendance or participation in a Learning Item is recorded, a corresponding Learning Event is added to each learner's learning history. Although most Learning Events relate to a specific Item, Learning Events can also be created for learning that does not relate to a Learning Item (External Events).

Learning History: A detailed list of all of the recorded Learning Events for a Learner.

Learning Needs: Learning Needs are the Learning Items assigned to the Learner's Learning Plan.

Learning Plan: The learning plan is a list of the items that a learner must complete, and target or deadline completion dates for each. To view the learning plan for any learner, bring the learner's information into view in the Learner's section, and choose the Learning Plan tab.

Pending List: If a Scheduled Offering requires supervisory approval, a Learner will be added to a pending list until the supervisor either approves or denies the registration.

Prerequisites: Items that must be completed before the current Item can be attempted.

Registration: To place a learner's name on the planned list of participants in a specific scheduled offering.

Registration Status: The status of a Learner's registration; types include: enrolled, waitlist, pending, and cancelled.

Scheduled Offering: An Item or Activity with a scheduled date and time.

Segment: Unit of division of an item offering, based on duration that facilitates variable resource scheduling. For example, a 40-hour course can be scheduled in any of the following ways: Divided into five 8-hour segments, scheduled one segment per day for five days Divided into ten 4-hour segments, scheduled two segments per day for five days into four 10-hour segments, scheduled one per day for four days. An item is divided into any number of segments of uniform or varying duration, scheduled over a period of days in order to fit the particular circumstances. Thus, SATERN allows you to schedule a course that meets first for a 2-hour segment in an auditorium, then for a 3-hour segment in a classroom, even though the segments may have completely different instructor and resource requirements.

Subordinate: All learners who have the target learner as a supervisor (either immediate or indirect such as the supervisor of a supervisor).

Supervisor: A supervisor is a learner that has been designated to oversee another learner's learning. A supervisor has the ability to log in to SATERN on behalf of their subordinates, and to view their subordinates' learning information and assign learning to them.

Waitlist: A list of learners trying to register for a scheduled offering that has already reached a maximum capacity. Learners can be moved automatically from the waitlist to a request list.